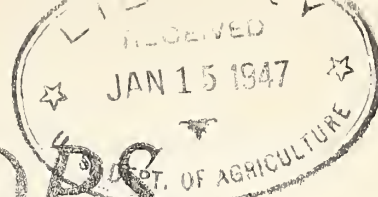


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FOREIGN CROPS and MARKETS

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L A T E C A B L E S

Canadian crop estimates released September 10, given in thousand bushels, first estimate this year with final estimate for 1940 in parentheses: Wheat, 306,459 (551,390); oats, 357,955 (380,526); barley, 121,378 (104,256); rye, 13,902 (13,994); flaxseed, 7,362 (3,049).

Declared exports of cashew nuts from the Madras Consular District of India to the United States, according to figures obtained from consular invoices during the month ended July 31, were 1,691 short tons. Average declared value per pound was 17.97 United States cents. Declared exports from Bombay Consular District were 33 short tons, and average declared value per pound was 18.84.

In addition to a 6-percent reduction in Swedish livestock numbers in 1940, a further 5- to 10-percent decrease is believed unavoidable on account of the feed shortage. Commercial slaughterings during the first 7 months of 1941, as compared with a year earlier, decreased as follows: Cattle, 4.2 percent; calves, 21.1 percent; hogs, 26.9 percent.

Uruguayan wool market quiet during August, with prices nominal. Future sales of new-clip wool reported to have reached 2,500,000 pounds. Preliminary estimates of 1941-42 wool clip vary from 112 to 127 million pounds. Total exports and shipments to the United States for first 11 months of season, through August, were as follows, in millions of pounds with comparisons for a year ago in parentheses: Total, 143 (102); United States, 118 (73).

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G R A I N S

RAIN REDUCES EUROPEAN
WHEAT-CROP PROSPECTS . . .

Continued rainfall during August, especially in central and western Europe and parts of the Danube Basin, has caused some deterioration from earlier-season wheat-crop prospects, according to information received in the Office of Foreign Agricultural Relations. There are very few official crop estimates or condition reports available; on the basis of such weather and crop information as is available, however, the United States Department of Agriculture now forecasts a wheat outturn in Europe in 1941 of approximately 1,430,000,000 bushels. This compares with the earlier season forecast for all of Europe (excluding the Soviet Union) of 1,460,000,000 bushels and an estimated outturn in 1940 of around 1,325,000,000 bushels. Though a harvest of this size would be below the 5-year (1930-1934) average of 1,516,000,000 bushels, it would exceed last year's very poor outturn by 105,000,000 bushels, or around 8 percent.

Should unfavorable weather conditions continue for harvesting and threshing operations, especially in northern Europe, some further small reductions in the European total may be expected to occur. The delayed growing season appears to have contributed considerably to the amount of damage done this year, inasmuch as the wheat harvest is usually well along by early August except in the higher elevations and the more northern areas. The rye harvest, which is slightly earlier and much more important than wheat in central Europe, is reported to have been well advanced before the rainy weather started so that little damage resulted. The quality of the wheat harvested this year, as is quite common in rainy seasons, is said to have suffered more than the yield per acre. Reports indicate that it has a very high moisture content in many cases and is not suitable for immediate use.

As far as individual countries and regions are concerned, the principal gains over last year are expected in western Europe, notably France, the British Isles, and Portugal, with some small increases in central Europe and the Danube Basin. The outturn in French North Africa is reported to be considerably above last year's poor crop and should permit some exports. Prospects in Turkey and Greece, on the other hand, are reported much less favorable than a year ago. In general, it appears that the larger wheat acreage for harvest this year will account for the major part of the expected increase in the crop outturn; unfavorable weather conditions during much of the growing and harvesting season have prevented acre yields from significantly exceeding last year's generally below-average levels, except in certain countries such as France, Belgium, and Portugal where 1940 yields were abnormally low.

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SPANISH RICE CROP SUFFICIENT FOR DOMESTIC NEEDS . . .

The 1941 rice crop in Spain, based on mid-season conditions, has been placed at 12,740,000 bushels, according to a report received by the Office of Foreign Agricultural Relations. Weather conditions have been favorable, but it is believed that lack of sufficient fertilizer will keep the yield below average. Various trade sources estimated the 1940 harvest at between 11,800,000 and 13,470,000 bushels. No official estimates have been released since the beginning of the Spanish Civil War.

Production during 1932-1936 averaged 14,160,000 bushels, and during this period Spain exported from 10 to 30 percent of the annual crop. Last year the harvest was insufficient for the 1940-41 season on account of the food shortage in Spain, and additional rice supplies were obtained from Egypt. It has been reported that if the crop this year turns out according to early expectations, Spain may have sufficient rice for domestic consumption.

GRAIN STATISTICS . . .

GRAINS: Weekly average closing price per bushel, future delivery,
at leading markets, 1940-1941

Week ended	Wheat						Corn			
	Chicago		Winnipeg <u>a/</u>		Buenos Aires		Chicago		Buenos Aires	
	1940	1941	1940	1941	1940	1941	1940	1941	1940	1941 <u>b/</u>
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High <u>c/</u> .	77	116	67	71 <u>d/</u>	75	57	63	78	35	26
Low <u>c/</u> ..	70	104	67	66 <u>d/</u>	65	55	58	75	32	26
September										
Aug. 9.	74	112	67	68	70	55	61	78	33	26
16.	72	111	67	69	70	55	61	78	33	26
23.	70	112	67	68	65	55	61	77	33	26
30.	72	113	67	66	65	55	62	77	32	26
Sept. 6.	75	116	67	66 <u>a/</u>	66 <u>a/</u>	55	63	78	32	26

Corn prices at Buenos Aires compiled from New York Journal of Commerce; all other prices from Chicago Daily Trade Bulletin.

a/ October futures.

b/ Official price.

c/ July 5 to September 6, 1941, and corresponding dates for 1940.

d/ August and September futures.

WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries,
as given by current trade sources, 1938-39 to 1940-41

Country	Total shipments		Shipments 1941 week ended			Shipments July 1-Sept. 6	
	1938-39	1939-40	Aug. 23	Aug. 30	Sept. 6	1940-41	1941-42
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels	bushels	bushels	bushels
North America <u>a/</u>	245,296	209,872	4,766	4,205	4,375	33,030	49,344
Argentina	114,272	173,776	1,263	1,326	1,403	27,401	19,644
Total above	359,568	383,648	6,029	5,531	5,778	60,431	68,988

Compiled from official and trade sources.

a/ Broomhall's Corn Trade News.

FEED GRAINS: Movement from principal exporting countries,
September 6, 1941

Commodity and country	Yearly exports		Shipments week ended <u>a/</u>			Exports as far as reported		
	1938-39	1939-40	Aug. 23	Aug. 30	Sept. 6	July 1 to	1939-40 <u>b/</u>	1940-41 <u>b/</u>
	1,000	1,000	1,000	1,000	1,000		1,000	1,000
	bushels	bushels	bushels	bushels	bushels		bushels	bushels
BARLEY, EXPORTS: <u>c/</u>								
United States ..	11,215	3,532	-	-	-	June 30	3,532	627
Canada	16,537	13,338	-	-	-	June 30	13,338	1,574
Argentina	9,356	18,628	-	-	-	June 30	18,628	4,588
Danube & U.S.S.R.	26,005	4,272	-	-	-	June 30	4,272	1,000
Total	63,113	39,770	-	-	-		39,770	7,789
OATS, EXPORTS: <u>c/</u>								
United States ..	5,106	1,429	-	-	-	June 30	1,429	1,257
Canada	13,738	24,330	-	-	-	June 30	24,330	15,690
Argentina	19,379	27,624	-	-	-	June 30	27,624	4,070
Danube & U.S.S.R.	30	250	-	-	-	June 30	250	0
Total	38,253	53,633	-	-	-		53,633	21,017
CORN, EXPORTS: <u>d/</u>						Oct. 1 to		
United States ..	34,369	44,284	-	-	-	June 30	31,854	9,435
Argentina	142,869	87,177	347	469	531	Sept. 6	85,947	21,245
Danube & U.S.S.R.	19,629	5,304	-	-	-	Sept. 6	4,832	0
South Africa ...	25,991	15,499	-	-	-	Sept. 6	14,745	0
Total	222,858	152,264	-	-	-		137,378	30,680
United States imports	442	1,110	-	-	-	June 30	484	1,092

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Year beginning October 1.

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V E G E T A B L E O I L S A N D O I L S E E D S

INDIAN FLAXSEED PRODUCTION LOWER;
RAPE AND MUSTARD SEED HIGHER . . .

The Indian flaxseed crop for 1940-41 is placed at 482,000 short tons from 3,583,000 acres and represents a decrease of 8 percent in production and 4 percent in acreage, as compared with the revised final estimates for the previous year, according to information received in the Office of Foreign Agricultural Relations. The lower yield in the Central Provinces and Berar was due to untimely rain and hail, while in Bengal the crop was adversely affected by drought. The loss in these Provinces was offset to some extent by increases in the less important producing areas, where growing conditions were more favorable.

Export statistics have not been published for some time; however, it was reported by trade circles earlier in the year that the British Ministry of Food had purchased around 22,000 tons. The bulk of this trade is usually with the United Kingdom.

Both area and yield of rape and mustard in 1940-41, amounting to 6,063,000 acres and 1,213,000 short tons, were slightly below the final revised estimate for 1939-40 but exceeded the average for the years 1935-36 to 1939-40 by 7 and 9 percent, respectively.

As in the case of flaxseed, trade figures have not been available since 1939. Exports of rapeseed varied considerably prior to that time but mustard seed averaged around 2,650 tons from 1935 to 1939. Both rape- and mustard-seed oil are popular with the natives in some sections of India.

INDIA: Area and production of specified oilseeds,
1935-36 to 1940-41

Year	Flaxseed <u>a/</u>		Rape and mustard seed <u>b/</u>	
	Area	Production	Area	Production
	1,000 acres	1,000 short tons	1,000 acres	1,000 short tons
1935-36	3,457	435	5,333	1,072
1936-37	3,677	470	5,889	1,080
1937-38	3,890	516	5,461	1,147
1938-39	3,869	495	5,535	1,029
1939-40 <u>c/</u>	3,715	522	6,113	1,252
1940-41	3,583	482	6,063	1,213

Compiled from official sources.

a/ Approximately 94 percent of total. b/ 96 percent of total. c/ Revised.

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GOLD COAST PALM EXPORTS
AFFECTED BY EUROPEAN WAR . . .

The export of palm products has suffered a sharp decline in recent years and is now at a very low figure, mainly due to the low prices obtained in European markets. The decline in exports has, however, been accompanied by an increase in domestic utilization. The oil palm is indigenous to the forests of the Gold Coast, palm oil and palm-kernel oil are both used by the natives for culinary purposes and in the manufacture of soap. In common with the rest of the West African Colonies, the Gold Coast is faced with severe competition in foreign markets from the oil-palm plantations in Malaya and Sumatra; and it is doubtful whether the rural population is large enough or sufficiently well organized to maintain an efficient export industry in this product in view of the larger needs of production of cacao, which is the principal export crop of the Colony. There is ample room, however, for greater local utilization of palm oil.

A mill in the western Provinces of the Colony consumes around 5,000 short tons of fruit annually, disposing of practically all of the oil locally; but a mill erected at Bukunor in the eastern Province in 1931 under a Government subsidy scheme has not operated for several years, as native producers would not accept the low rates it was necessary to offer for the fruit.

The total production of palm oil and palm kernels in the Gold Coast is not known, but it is believed that only a very small amount of the total quantity produced enters into export trade. A paramount difficulty in forecasting production arises because decreases or increases in production do not depend upon fluctuation in the acreage, which is more or less constant, but primarily on the price level.

Most of the oil-palm trees in the Colony grow wild and it is chiefly the fruit from these trees that enters into the trade. Plantations are few in number and cannot be increased in a short time. While statistics for 1940 are not complete it is stated by the Agricultural Department of the Gold Coast Colony that there was a small increase in production due to a decline in imports of edible oils; the total normal imports of edible oils constitute only a small fraction of the total consumption. Increased domestic utilization of palm oil is likely to continue for the duration of the war.

Exports of palm oil during the first decade of this century ranged from 11,000 to 17,000 short tons annually, but during the past decade have declined to about 600 tons annually. Palm-kernel exports have shown a downward trend but not to the extent of palm oil. The relative figures are about 14,000 tons in the first decade of the century, shrinking to about half that amount in the past 10 years. Palm-kernel oil is more

efficiently extracted in European countries than in West Africa. Countries of destination of 1940 exports are not available, but before the war, Germany and the Netherlands were the principal importers.

Prices are controlled in the United Kingdom, and values for the first 5 months of 1940 were established at \$45.79 per short ton (f.o.b.) for palm oil and \$25.71 per ton for palm kernels. Values for the remaining 7 months have not been published. These figures show a decrease in the prices paid as compared with prices ruling prior to the outbreak of the war.

GOLD COAST: Price per short ton of palm oil and palm-kernel oil, January-May 1940, with comparisons

Period	Palm oil	Palm-kernel oil
	Dollars	Dollars
1939 (January-August)	63.65	32.65
1939 (September-December)	45.24	23.85
1940 (January-May)	45.79	25.71

American Consulate, Lagos, Nigeria.

The retail price of palm oil in the Accra market is about \$107.81 per ton, which is normal, prices being controlled during the war.

Unlike cacao, no Government-control scheme is in operation in connection with the trade in palm oil and palm-kernels, but, as is the case with all products, export licenses must be obtained. The trade in these commodities is of no great importance to the Gold Coast, and little information regarding the market outlook can be obtained.

SWITZERLAND INCREASES PRODUCTION OF TOBACCO SEED FOR OIL . . .

The Federal War Food Office of Switzerland has issued a regulation requiring tobacco farmers to permit a portion of their plantings to bear seeds. Ordinarily, tobacco blossoms are pruned after blooming to improve the quality of the leaves. It is believed that a harvest of 500 pounds or more of tobacco seed per acre may be expected. In recent years Switzerland has been growing a total of about 1,800 acres of tobacco. Tobacco seed is said to yield 40 percent of good quality oil that may be used either as food or adapted to industrial purposes. If this year's trial is satisfactory, an increased portion of tobacco acreage will be devoted to seed production in 1942.

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C O T T O N - O T H E R F I B E R S

JAPANESE COTTON TRADE
AT VIRTUAL STANDSTILL . . .

Japanese trade, both in imports of cotton and exports of cotton textiles since the British, American, and Netherland freezing orders became effective the last week in July, has been limited largely to liquidation of contracts entered into previously, according to information received in the Office of Foreign Agricultural Relations. This trade during the past 2 years has been heavily dependent on Japanese shipping services. Many of these ships were ordered withdrawn from British and American waters as a result of the freezing orders and political tension.

A review of the year ended July 31, 1941, included in this month's report, reveals that operations of the Japanese cotton textile industry were maintained as high as possible in anticipation of improved conditions. At the same time some effort was made to reduce the heavy stocks of cotton piecegoods estimated unofficially in the middle of 1940 at around 1.25 billion square yards. Current stocks are believed to be still as high as 1 billion yards. Further reductions may be achieved if plans announced in July for distribution of more cotton textiles on domestic markets and virtual discarding of the link system are carried out.

Strong demand for piecegoods from the Netherlands Indies in the spring of 1941, together with tighter internal control of production and prices, resulted in a price rise to a level in July about 150 percent above that of a year earlier. This factor has tended to lessen Japan's former competitive advantage of low-priced goods for export markets.

Higher prices received for piecegoods, on the other hand, have enabled mills to realize a reasonable profit, even though operations were reduced to 55 percent of capacity and costs of production rose by 50 percent from the level of a year ago. The effect of the British and Netherland orders on Japan's export trade in cotton textiles may be measured by the fact that prior to the outbreak of war in Europe, about two-thirds of this trade was in currencies linked to the British pound.

The spinning industry completed its reorganization by February 1941, merging into 14 blocks for the purpose of establishing more centralized control and rationalization of the industry. Reorganization of the Cotton Merchants Union was delayed, but plans were finally made for the newly formed Cotton Import Control Company to begin operations late in July. Disruptions of trade resulting from the freezing orders prevented the new organization from beginning active operations.

Imports of raw cotton in 1940-41 were estimated unofficially at 1,550,000 bales. Consumption was estimated at about 1,600,000 bales and stocks at the end of July were believed to be about 450,000 bales, or 50,000 less than those of a year ago. A recent report received from India indicated that shipments of Indian cotton to Japan (including Chosen and Manchuria) during the 10 months ended June 30, 1941, amounted to about 640,000 bales (of 478 pounds). It was also estimated that an additional 200,000 bales would be shipped in July and August, bringing the 1940-41 (September-August) total to around 840,000 bales compared with about 690,000 bales for the 1939-40 year. Japanese purchases were unusually slack until April or May. Heavy buying of Indian cotton lasted only 2 or 3 months. It was estimated early in July that between 210,000 and 250,000 bales of Indian cotton had been bought and were lying at Bombay and Karachi at that time awaiting shipment to Japan. It is not yet known how much of this cotton was shipped to Japan before the freezing orders were announced.

Imports of American cotton during the 11 months ended June 30, 1941, were estimated at about 120,000 bales against about 860,000 for the corresponding period a year ago. The decrease is attributed to relatively higher prices of American, a shortage of shipping space, and large stocks of American cotton at the beginning of the season. The American cotton imported was principally California and Arizona types. Regular commercial shipping between Japan and the United States was brought to a virtual standstill near the end of the season as a result of political developments. All Japanese commercial shipping was to have been taken over by the Government as of September 1 and put on a wartime basis. It appears that availability of shipping space in the coming season will depend more on political than economic developments.

Prices of Brazilian cotton delivered in Japan were 2 to 3 cents per pound less than comparable grades of American throughout most of the past year. Brazil's export statistics indicate that 379,000 bales were shipped to Japan during the year ended July 31, 1941. Sources in Japan pointed out that imports of Brazilian cotton at relatively low prices might have been much heavier than they were if more shipping facilities had been available.

Imports from Egypt in 1940-41 amounted to about 50,000 bales, or roughly one-third of peacetime imports from that country. It appears that Japan's requirements for long staple cotton were filled largely from Peru. Peruvian statistics show exports of 184,000 bales (practically all long staple) to Japan during the year ended July 31, 1941, compared with only 35,000 bales in 1939-40 and 21,000 in 1938-39. Imports from East Africa in 1940-41 are estimated at 10,000 to 12,000 bales.

Monthly cloth production in 1940-41 is estimated to have averaged 175 to 180 million square yards against 236 million in the previous year. Production of pure cotton yarn for the year is estimated at 1,645,000

bales (of 400 pounds each) or 25 percent below that of 1939-40. A decrease of about 25 percent in the volume of cotton piecegoods exports was reported for the 11 months ended June 30, 1941, but the total value was actually greater than in the corresponding period of 1939-40.

Prior to the announcement of the freezing orders it appeared that all exports were to be placed on a quota basis and strictly rationed. This move was inaugurated in an effort to maintain prices and as a safeguard against depletion of stocks in the event access to raw cotton supplies became difficult. Principal export markets for cotton piecegoods were Netherlands Indies, French Indochina, Australia, India, and South Sea areas. Freezing orders have handicapped Japanese exports to all these markets except French Indochina.

Uncertain political conditions in the Orient make it impracticable to point out economic factors that may influence the course of Japanese cotton trade in coming months. The industry will not feel the full effect of the freezing orders immediately because of several months' supply of raw cotton, reduced requirements for exports of piecegoods, and large existing stocks of cotton goods on hand. Continuation of the present situation over a period of a few months, however, may bring serious consequences to all parts of the industry.

LARGER COTTON ACREAGE PLANTED IN BULGARIA . . .

Cotton growers in Bulgaria were requested by the Government to plant about 178,000 acres to cotton this year, against 124,000 acres in 1940-41, and are reported to have actually exceeded the requested acreage. The cool weather that prevailed during the early growing season, however, has retarded the growth of the plants and may prevent a normal yield.

In view of the shortage of cotton and other textile fibers in the country, a Government order was issued on May 20, 1941, prohibiting the use of cotton, hemp, or jute for the manufacture of bags for packing flour and salt. Paper bags are to be used for such purposes. No foreign sources for cotton imports, except possibly Turkey, are open to Bulgarian importers since the beginning of hostilities in Russia.

Production in Bulgaria normally amounts to about 45,000 bales annually and is equivalent to about one-third of the domestic mill industry's requirements. The quality of the cotton is such that it can be used only for spinning yarn of low and medium-fine counts.

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T O B A C C O

INDIA REDUCES OLD AREAS
 UNDER FLUE-CURED TOBACCO
 AND OPENS NEW ONES . . .

It is estimated that between 100,000 and 110,000 acres will be planted to flue-cured tobacco in India this fall for harvest in the spring of 1942, according to information available in the Office of Foreign Agricultural Relations. This prospective acreage represents a considerable reduction from the 1941 area when 123,300 acres were harvested, but the 1942 output under normal weather conditions should be somewhat greater than this year's crop, which was reduced much below early expectations by adverse weather conditions.

The greatest reduction in the 1942 area will be in the Madras coast district, where it has become necessary to curb the development of "tokra," a parasitic weed attaching itself to the root of the growing plant. It can be eradicated only by pulling it out; or, in extreme cases, by taking the land out of production for awhile.

INDIA: Area, production, and prices of flue-cured tobacco,
 1935-1941

Year of harvest	Area	Production	Price per pound	
			Indian currency	United States currency
	<u>Acres</u>	<u>1,000 pounds</u>	<u>Annas</u>	<u>Cents</u>
1935	34,000	13,500	4.3	10.1
1936	39,000	16,400	4.0	9.3
1937	44,000	19,500	5.4	12.6
1938	84,000	40,000	5.7	13.3
1939	103,192	46,110	4.0	18.7
1940	77,320	35,760	5.8	10.8
1941	123,300	49,427	a/	a/

Compiled from semiofficial and trade sources. a/ Not available.

The 1941 harvest of about 49.4 million pounds was reported to have been the lowest outturn in several years. On the Madras coast approximately 120,000 acres produced only 48 million pounds instead of 70 million, which would have been a reasonable expectation under normal weather conditions. Production in Mysore State was but little better, amounting to only about 1 million pounds from 2,500 acres.

The outstanding feature of the 1941 harvest was the increase in flue-cured area on the Madras East Coast. This district, formerly called the Guntur area, has now grown so large that "Guntur" is a misnomer. New districts have been opened up north to Tuni, south to 20 miles beyond Ondole, and inland across the border into Hyderabad State. It is estimated

that the maximum tobacco territory capable of development into flue-cured production in the entire Madras East Coast district may eventually reach 150,000 acres, and if further expansion is made in this type other parts of India must be opened up.

A start in that direction is being made in the United Provinces at Jhansi where the Government has appropriated money for a 5-year research scheme to experiment with the production of flue-cured tobacco. The dry, frost-free portion of the United Provinces is said to be suited to the cultivation of cigarette tobacco. About 300 acres have been planted on the experimental farm near Jhansi, and demonstrations have been made in the neighborhood with the idea of popularizing the growth of flue-cured types.

As the tobacco growers of these districts do not know the technique of producing such tobaccos, the Department of Agriculture has appointed a qualified staff to grow and cure the leaf. Curing barns have been constructed and all the cured leaf grown on the experimental farm will be purchased by the British company most interested in the development. This company has agreed to pay fair prices and is developing a center of its own.

INDIA: Harvested area and production of flue-cured tobacco, by principal producing districts, average 1935-1939, annual 1940 and 1941

Producing district	Average 1935-1939		1940		1941	
	Area	Pro-duction	Area	Pro-duction	Area	Pro-duction
	Acres	1,000 pounds	Acres	1,000 pounds	Acres	1,000 pounds
Madras East Coast	60,000	27,680	74,500	34,300	120,000	48,000
Mysore State	800	160	2,500	1,300	2,500	1,062
Bihar	-	-	200	100	200	130
Baroda	-	-	120	60	100	35
Jhansi	-	-	-	-	500	200
Total	60,800	27,840	77,320	35,760	123,300	49,427

Compiled from semiofficial and trade sources.

No information as to the domestic consumption of tobacco in India is available, but it is believed that the use of cigarette types is increasing at the rate of about 5 percent annually, in view of the upward trend in cigarette consumption. Apparently the war has had little effect on tobacco consumption in India itself, the only unusual development being the policy of stock accumulation (particularly of imported types) on the part of manufacturers. The war demand for tobacco products, however, is making itself felt to an increasing extent and the wartime Government purchases of cigarettes and tobacco for the Indian army and for shipment to the British forces amount to no small sum.

CANADIAN TOBACCO CROP
INCREASED FROM A YEAR AGO
BUT BELOW 1939 . . .

The combined 1941 production of all types of tobacco in Canada was officially estimated on August 30 at 67.3 million pounds, as compared with the 1940 harvest of 60.4 million and the record 1939 crop of 107.7 million pounds. Harvest was under way in all districts, and unless frost, storms, or other disasters occur before the crop is all removed from the fields, the final 1941 output is not expected to vary materially from the official estimate, according to Clifford C. Taylor, American agricultural attaché at Ottawa.

The acreage of flue-cured tobacco was slightly increased from last year's harvested area in each of the three producing Provinces, and the August 30 estimate places the crop at 53.6 million pounds as compared with 39.1 million in 1940, and 79.7 million, the record 1939 crop. Quality of first curings was rather poor and variable, and the entire crop is expected to average only fair.

CANADA: Tobacco acreage and production, 1939-1941

Type and Province	Acreage			Production		
	1939	1940	1941	1939	1940	1941
	Acres	Acres	Acres	1,000 pounds	1,000 pounds	1,000 pounds
Flue-cured						
Quebec	5,710	5,520	5,800	4,120	4,436	4,000
Ontario	63,820	42,640	44,500	75,294	34,200	49,000
British Columbia	310	450	630	320	508	600
Total	69,840	48,610	50,930	79,734	39,144	53,600
Burley-Ontario	11,190	9,710	7,120	15,248	11,064	7,000
Dark-Ontario <u>a/</u>	2,890	1,100	975	3,872	1,466	1,000
Cigar leaf-Quebec	4,600	4,370	3,865	5,190	4,694	3,500
Large pipe-Quebec	2,830	1,840	680	3,180	2,112	600
Medium pipe-Quebec	<u>b/</u>	1,670	1,580	<u>b/</u>	1,593	1,300
Small pipe-Quebec	950	580	550	479	310	300
Total	92,300	67,880	65,700	107,703	60,383	67,300

From latest official Canadian sources.

a/ Includes 252,000 pounds grown from 240 acres in Quebec in 1939; Quebec acreage in 1940 included with large pipe tobacco.

b/ Included with large pipe tobacco.

Burley tobacco is also expected to be only fair in quality. Rainy weather during the latter part of August interfered with harvesting and curing.

The acreage and production of types other than flue-cured were below those of last year and much below those of 1939. Yields per acre were lowered by the drought and heat in Quebec during June and July, and in Ontario during late July and early August. Hail in Ontario also destroyed about a million pounds.

DOMINICAN TOBACCO CROP DROPS
AS RESULT OF LOW PRICES . . .

The Dominican tobacco harvest of 1941 is reported to have been much smaller than that of 1940, owing to the fact that producers have become discouraged with low prices, according to information received in the Office of Foreign Agricultural Relations. The crop was reduced also by adverse weather conditions.

No definite figures are available for tobacco production in the Dominican Republic, but the 1940 crop was estimated at about 17 million pounds as compared with an average production of from 20 to 25 million pounds. Leaf exports average about 15 million pounds annually and domestic consumption amounts to 5 or 6 million pounds.

Stocks from the 1940 crop were reported in July at approximately 615 million pounds, almost all of which had been contracted for by Spanish firms. It is estimated that the 1941 crop will be easily disposed of in the same manner.

Growers' prices have been low in the Republic for many years. Compared with the export price, there is a wide spread. Recent prices paid the producer have not averaged over \$2.50 per 100-pound bale, while the export price has been about \$7.75 f.o.b. So far, there has been no difficulty in arranging for payment on the basis of f.o.b. letters of credit at port of shipment.

If the internal conditions of Spain (the principal buyer at present) enable that country to continue making purchases of Dominican tobacco, the future of the industry would seem to be more favorable. Before the war, approximately 97 percent of the Dominican leaf exports were sold to Europe - principally to Germany and the Netherlands. Tobacco in the Dominican Republic is the small farmer's cash crop. It is grown by more planters on small areas than any of the leading export products.

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F R U I T S, V E G E T A B L E S, A N D N U T S

TURKISH FIG CROP ABOVE LAST YEAR 1/ . . .

The 1941 preliminary forecast of edible fig production in the Smyrna area of Turkey is 39,600 short tons as compared with an estimated production of 30,800 tons in 1940 and 38,000 tons in 1939. The forecast is 30 percent larger than the 10-year average (1930-1939) estimated production of 27,700 tons and 26 percent larger than the recent 5-year average (1935-1939) of 29,400 short tons.

TURKEY: Estimated production of Smyrna figs, 1930-1941

Year	Edible	Inedible (Horda)	Total
	<u>Short tons</u>	<u>Short tons</u>	<u>Short tons</u>
1930	26,000	2,000	28,000
1931	26,500	3,000	29,500
1932	27,500	3,000	30,500
1933	25,300	6,600	31,900
1934	25,000	7,000	32,000
1935	25,800	8,800	34,600
1936	26,400	11,000	37,400
1937	28,600	10,700	39,300
1938	28,000	7,000	35,000
1939	38,000	600	38,600
1940 <u>a/</u>	30,800	1,200	32,000
1941 <u>b/</u>	39,600	<u>c/</u>	

a/ Preliminary estimate.

b/ Preliminary forecast.

c/ Not yet available.

The 1941 growing season to date has been generally favorable to the development of the largest fig crop in the past 10 years. Growers report that rainfall has been adequate during the entire season, and no extremes of temperature have occurred. Fertilization took place under ideal conditions and, consequently, the drop was considerably reduced. The supply of labor, which early in the season caused some concern to growers, turned out to be satisfactory and met all demands of the fig industry.

The spread of the war to the Eastern Mediterranean made the Turkish exportation during the 1940-41 marketing season difficult. The exportation

1/ Prepared by Walter R. Schreiber, Marketing Specialist.

of figs to Axis-controlled countries, normally among the principal buyers of Smyrna figs, was greatly restricted. While quantitative data on total Turkish figs are not available for the 1940-41 season, it is believed that exports to Axis-controlled countries has been very small.

Exports to the United Kingdom of Smyrna figs of edible qualities during the first 4 months of 1941 are known to have amounted to 10,769 short tons, while exports to all other destinations amounted to only 251 tons. It was reported in October 1940 that the British had contracted for at least 5,500 tons, most of which were shipped to the United Kingdom before January 1941.

By July 1, 1941, stocks remaining in packers hands were estimated at only 500 short tons. This would seem to indicate that the British purchases, as well as those of the Alcohol Monopoly, and the small purchases of other countries had taken care of the entire production in 1940. In this connection, exports to the United States from September 1, 1940, to June 30, 1941, amounted to only 285 short tons as compared with 788 tons for the same period a year earlier.

UNITED STATES: Imports of figs, calendar years, 1937-1941

Country	1937	1938	1939	1940	1941 <u>a/</u>
	Short tons	Short tons	Short tons	Short tons	Short tons
Turkey	1,253	840	797	411	57
Greece	1,403	917	1,302	445	10
Portugal	39	10	14	47	2
Syria	3	3	-	-	-
Others	549	653	155	-	-
Total	3,247	2,423	2,268	904	69

Compiled from Bureau of Foreign and Domestic Commerce statistics.

a/ To end of June 1941.

The 1941-42 marketing season was scheduled to open the third week of August, though new-crop figs began to appear late in July. The export outlook appears rather uncertain again this season. The Russo-German war has closed the route via the Black Sea to Rumania and Central Europe. It was hinted in some quarters that the all-rail route from Istanbul to Central Europe might be reopened by the time the new-crop figs are ready to move.

There appears to be little chance of figs moving overland to Basrah on the Persian Gulf for eventual transshipment to the United States. The

possibility remains of moving figs, olive oil, and other Turkish products via coastal steamer to Alexandria; however, reports indicate that available tonnage is small and freight rates extremely high. The ocean freight on this portion of the trip as well as the high rates via nonbelligerent ships from Egypt and high marine insurance will have a decided restrictive influence on exports to the United States.

The political and economic policies of the United Kingdom, together with the ability of British merchant ships to call at Izmir during the 1941-42 marketing season, which has just opened, will determine whether exports will be made to the United Kingdom.

**TURKISH RAISIN FORECAST
CONSIDERABLY LARGER
THAN LAST YEAR . . .**

The 1941 preliminary forecast of raisin production in Turkey is 55,000 short tons compared with 33,000 tons in 1940 and 81,000 tons in 1939. The forecast is 25 percent below the recent 5-year average (1935-1939) of 73,800 tons and 12 percent below the 10-year average (1930-1939) of 62,400 tons. The latest reports, prepared early in July, indicated that growing conditions up to that time had been generally satisfactory. The floods and excessive moisture during the winter (1940-41) did no material damage to the vineyards.

Exports of raisins from the 1940 crop are reported to have been considerably below those of former years due to the war and because of the extremely small harvest. Quantitative export data are not available; however, it is reported that during the first 6 months the United Kingdom was the destination of at least 23,000 short tons, while all other countries accounted for an estimated 3,800 short tons. Germany and Italy received relatively few Turkish raisins during the 1940-41 marketing season. Stocks on hand in Turkey on June 30 were estimated at only 300 short tons.

The 1941-42 market was scheduled to open about August 20. Exporters during early July were somewhat apprehensive with regard to the export prospects for the new season. The spread of the war into the eastern Mediterranean has further reduced shipping facilities. A new shipping service employing Turkish vessels to carry exports to Port Said, Egypt, was inaugurated a short time ago and is expected to make possible some exports. There is some doubt as to whether or not the British will continue their heavy volume of purchases during the 1941-42 marketing season. German purchases, if any take place, will be routed overland, which will be rather costly.

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L I V E S T O C K A N D A N I M A L P R O D U C T SLIVESTOCK INDUSTRY STRONG IN
CANADA'S WESTERN PROVINCES . . .

Recent reports received from Winnipeg indicate that the livestock industry of the western Provinces of Canada (Alberta, Manitoba, Saskatchewan, and British Columbia) is experiencing better-than-average conditions in 1941. Despite a slightly unfavorable feed situation during the current year as compared with 1940, livestock populations have been increased to meet British and domestic demands. Prices have been well maintained, and exports are proceeding at an expanded rate.

Cattle conditions are reported to be very favorable. Domestic markets are requiring more beef, and exports are increasing. Canadian exports of beef cattle to the United States from January 1 to August 28, 1941, amounted to 89,638 head as compared with 74,778 head a year earlier. Of this amount, 69,265 head were shipped from western Canada. Canadian cattlemen are also engaged at present in building up their herds, so it is quite probable that the United States import quotas for heavy Canadian cattle may not be filled for some time. Cattle movements to eastern Canada this year have been smaller than in 1940.

CANADA: Exports of livestock to United States,
January 1-August 28, 1940 and 1941

Province	January 1-August 28			
	Beef cattle	Dairy cattle	Calves	Hogs <u>a/</u>
	<u>Number</u>	<u>Number</u>	<u>Number</u>	<u>Number</u>
<u>Eastern Canada -</u>				
Maritimes	111	505	93	7
Quebec	1,145	3,563	1,651	28
Ontario	19,117	7,837	39,266	3,840
Total Eastern Canada ..	20,373	11,905	41,010	3,875
<u>Western Canada -</u>				
Manitoba	40,041	92	10,986	1,739
Saskatchewan	1,112	21	-	55
Alberta	1,225	17	1	825
British Columbia	26,887	399	152	27,538
Total Western Canada ..	69,265	529	11,139	30,157
Total Canada	89,638	12,434	52,149	34,032
Total, 1940	74,778	9,376	58,585	180

Compiled from Canadian Live Stock Market Review.

a/ Hog exports to the United States are now prohibited.

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Swine numbers in western Canada are reported to be much larger in 1941 than in 1940. British Columbia reports a doubling of its swine population, and even though high feed costs in the spring made the outlook discouraging, the present outlook is much brighter. Manitoba reports that there has been a slight reduction in the total swine population, but the average number of pigs produced per litter has been increased. Shipments of hogs and pork to the United States have been prohibited because of the large British demand. During the period January 1 to August 28, of 1941, 3,798,000 hogs were shipped from all Canada to packing plants as compared with 3,024,000 during the same period of 1940. The hog market has remained firm all the while.

Canada's horse population is about the same as it was a year ago, when the figure was set at 2,858,000, of which 1,866,000 were in western Canada; however, the present gasoline shortage is causing a marked interest and demand for horses. It is reported that the disease encephalomyelitis (equine sleeping sickness) has been found in some districts of Saskatchewan, but that it has been kept out of British Columbia by a rigid practice of requiring double vaccination before imports are allowed.

Sheep flocks are being expanded in British Columbia and Alberta. Total shipments and sales of sheep to packing plants of all Canada from January 1 to August 28, 1941, were 327,000 as compared with 309,000 a year ago. Lamb prices experienced their usual and expected seasonal decline. The movement of sheep from western to eastern Canada has been much greater this year than last, which contrasts with the reduced eastward movement of cattle and calves.

Large British needs and domestic requirements have caused the dairy industry to expand steadily. Output of butter and cheese is well above last year's figures despite the regular seasonal decline in milk production. Prices are also higher than a year ago.

An unlimited United Kingdom market for eggs has resulted in a sharp increase in poultry raising. This increase is just now underway, however, because news of the British market reached producers too late to affect spring hatches. Strong efforts are being made to increase output and decrease production costs. Egg prices in early August were approximately 40 percent higher than at the same time last year. Canada's total poultry population in 1940 stood at 64,000,000, while western Canada possessed only 19,000,000 of this number.

The below-average feed conditions as in western Canada have been brought about largely by a decrease in the production of oats and increased shipments of barley last season due to a definite shortage in eastern Canada. It is thought however, that in spite of the increase in the general livestock numbers, feed supplies will be large enough in the western Provinces to adequately take care of this population and

allow some for shipment to eastern Canada. Pasture and grazing conditions in Manitoba and British Columbia are reported to be very good. Pastures are rather dry in Alberta, but cattle have not suffered. Poorest conditions are said to exist in Saskatchewan because of the dry weather early in the summer.

CANADA: Total exports of domestic livestock and products,
July, and January-July, 1940 and 1941

Classification	Unit	July		January-July	
		1940	1941	1940	1941
Cattle	Number	8,541	18,381	76,032	81,024
Calves	do.	13,027	12,819	56,200	47,258
Hogs	do.	1,931	14,390	5,517	35,197
Sheep	do.	148	213	1,284	961
Beef	1,000 pounds	481	833	2,050	3,377
Bacon	do.	24,638	33,143	188,066	280,554
Pork	do.	573	2,128	3,759	14,760
Mutton and lamb ..	do.	22	28	98	184
Canned meats	do.	35	168	6,185	1,042
Lard	do.	845	2,109	1,646	3,064
Lard compound ...	do.	-	-	400	38

Canadian Live Stock Market Review.

CANADA: Imports of meat, July, and
January-July 1940 and 1941

Classification	July		Seven months	
	1940	1941	1940	1941
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Beef	a/	3	116	463
Bacon and hams	160	3	1,352	123
Pork	911	521	30,058	2,924
Mutton and lamb	-	a/	821	1,909
Canned beef	834	283	8,380	3,558
Other canned meats	4	4	138	34
Lard	1	a/	2	2
Lard compound	-	34	60	94

Canadian Live Stock Market Review.

a/ Less than 500 pounds.

ARGENTINE DAIRY INDUSTRY ENJOYING RECORD PRODUCTION AND TRADE . . .

The dairy industry of Argentina is enjoying its greatest period of production and trade in history, according to recent reports received in the Office of Foreign Agricultural Relations. The production figures for butter, cheese, and casein for the first 5 months of 1941 are well ahead of figures for the same products during the corresponding period of 1940. Of even greater significance to the economy of Argentina is the huge increase in exports of the above products during the first 6 months of 1941, as compared with the same period of 1940. Stocks of butter, cheese, and casein have all gradually diminished since January of this year, and at the end of May, stocks of each product were considerably smaller than a year ago, thus indicating that a large movement is taking place within the industry.

ARGENTINA: Production and stocks of creamery butter January-June, and of factory cheese and casein, January-May, 1940 and 1941

Month	Production					
	Creamery butter		Factory cheese		Casein	
	1940	1941	1940	1941	1940	1941
	pounds	pounds	pounds	pounds	pounds	pounds
January	8,627	10,192	10,928	13,812	4,339	7,191
February	8,241	9,310	10,558	12,394	4,367	5,062
March	7,811	9,268	10,807	12,976	3,915	4,583
April	6,638	7,504	8,671	10,251	3,261	3,142
May	5,580	5,908	7,930	8,404	2,577	3,183
June	4,367	4,661	-	-	-	-
Total	41,264	46,843	48,894	57,837	18,459	23,161
Total 1940	81,852	-	116,588	-	45,801	-
	Stocks					
January	5,904	12,577	45,525	44,348	22,535	25,514
February	7,716	10,562	46,936	44,180	24,392	26,513
March	10,370	7,112	47,741	44,443	26,696	26,250
April	11,138	4,720	44,215	43,704	27,877	22,917
May	11,429	4,209	51,158	40,033	23,968	15,183
June	6,750	3,269	-	-	-	-

Compiled from Boletín Estadístico República Argentina.

Production of creamery butter increased from 41,264,000 pounds at the end of June 1940 to 46,843,000 pounds for the first 6 months of 1941, representing an increase of 13.5 percent. Production of factory cheese and casein for January-May 1941 amounted to 57,837,000 and 23,161,000 pounds, respectively, as compared with 48,394,000 and 18,459,000 pounds at the end of the same 5-month period in 1940. This represents an increase of 18.3 percent in cheese production and 25.5 percent in casein production. Total exports of butter, cheese, and casein for the 6 months of 1941 were respectively 71, 370, and 91 percent higher than at the end of June 1940.

The United States and the United Kingdom continue to be by far the largest markets for Argentine dairy products. This has been more significant for the United States in 1941 than in 1940 because of the huge imports of Argentine cheese and casein. Previous to the entrance of Italy into the war, the United States imported much of its high-quality cheese from that country. Argentina is now supplying the United States with some of the imports of cheese formerly received from Italy. This is largely responsible for Argentine exports of cheese for the first 6 months of 1941 being larger than for the entire year 1940. This has of course necessitated somewhat of a revision and speeding up of Argentina's entire dairy industry in order to meet export demands.

ARGENTINA: Annual exports of butter, cheese,
and casein 1936-1940, and
January-June, 1940 and 1941

Year		Butter		Cheese		Casein
		<u>1,000 pounds</u>		<u>1,000 pounds</u>		<u>1,000 pounds</u>
1936	a/	21,779	b/	2,191		44,440
1937	a/	18,470	b/	2,681		35,915
1938		16,175		4,363		29,436
1939		19,747		5,746		45,338
1940		28,230		11,440		44,004
January-June						
1940		13,942		3,037		21,596
1941		23,870		14,287		41,177

Compiled from Boletín Estadístico Republica Argentina.

a/ Does not include 859,794 pounds in 1936 and 888,454 pounds in 1937 used for provisions on ships.

b/ Does not include 619,492 pounds in 1936 and 586,424 pounds in 1937 used for provisions on ships.

Thus far the greatest demand by the United Kingdom has been for Argentine butter. It is not yet definitely known whether such will be the

case in the future, since the United Kingdom is gradually shifting imports of dairy products from butter to cheese in order to conserve shipping space; however, regardless of the volume and products needed, it is thought that Argentina will be able to supply them because of the potential production capacity due to ideal location and natural production facilities.

ARGENTINA: Exports of butter, casein, and cheese,
by country of destination, June, and
January-June 1941

Country	June 1941			January-June 1941		
	Butter	Casein	Cheese	Butter	Casein	Cheese
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Bolivia	24	-	4	146	-	26
Brazil	-	-	4	2	-	37
Canada	-	-	40	-	130	112
Chile	42	-	9	93	223	26
China	-	262	-	-	395	-
Egypt	-	-	-	-	24	281
Spain	2	53	2	11	716	13
United States	282	8,371	3,014	924	28,213	11,471
Philippines	-	22	9	-	132	15
France	41	-	-	18	-	2
Italy	-	-	-	-	-	4
Japan	-	1,587	-	-	3,415	-
Mexico	-	57	9	-	201	33
Panama	4	-	9	9	-	31
Paraguay	18	-	22	82	2	150
Peru	-	-	-	40	-	179
Portugal	-	-	-	-	13	-
British Possessions .	79	22	-	677	99	18
French Possessions ..	-	-	-	9	-	-
Netherland Possessions	140	150	13	421	375	53
United Kingdom	393	558	40	21,343	6,718	1,630
South Africa	-	-	-	-	55	4
Soviet Union	-	441	-	-	441	-
Uruguay	7	-	-	26	-	-
Venezuela	-	7	77	35	13	183
Others	4	11	2	35	13	20
Total	999	11,521	3,254	23,871	41,178	14,288

Compiled from Boletín Estadístico Republica Argentina.

a/ Preliminary.

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GENERAL AND MISCELLANEOUS

FOREIGN EXCHANGE . . .

EXCHANGE RATES: Average value in New York of specified currencies,
September 6, 1941, with comparisons a/

Country	Monetary unit	Year 1940	Month				Week ended		
			1939	1940	1941		1941		
			Aug.	Aug.	July	Aug.	Aug. 23	Aug. 30	Sept. 6
		Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Argentina .	Paper peso	29.77	31.12	29.77	29.77	29.77	29.77	29.77	29.77
Australia <u>b/</u>	Pound	305.16	367.32	317.02	321.31	321.28	321.20	321.28	321.33
Canada <u>b/</u>	Dollar	85.14	99.49	86.86	88.27	88.96	89.09	89.23	89.44
China	Shang.yuan	6.00	7.16	5.48	5.24	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>
England <u>b/</u>	Pound	383.00	461.07	397.88	403.23	403.18	403.02	403.18	403.27
Germany ...	Reichsmark	40.02	39.86	39.35	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>
Italy	Lira	5.04	5.25	5.03	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>
Japan	Yen	23.44	26.87	23.43	23.44	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>
Mexico	Peso	18.55	16.80	19.99	20.54	20.54	20.53	20.54	20.54
Sweden	Krona	23.80	24.00	23.81	23.84	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>
Switzerland	Franc	22.68	22.57	22.75	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>	<u>c/</u>

Federal Reserve Board.

a/ Moon buying rates for cable transfers. Denmark, France, the Netherlands, and Norway omitted, as rates are not available. The last average monthly quotations in 1940 were as follows: Denmark, March 19.31 cents; France, June, 2.01; the Netherlands, April, 53.08; and Norway, April, 22.71 cents.

b/ In addition to the free rate there is also a fixed official buying rate: Australia, 322.80 cents; Canada, 90.91; and England, 403.50 cents.

c/ Not available.

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